

# How to Upload a Grant Note

To upload a Grant Note, from the My Grants List screen:

1) Click on the "GRANT NOTES" link on the right. A new window will appear.

**My Grants List**

\* indicates a required field.

Assignment Type **\*** ☒ Primary ☐ Offices

Program Activities

Grant Program

Grantee Name

Grant Number

Grant Document Number

Budget Period End Date From:  To:  (Format: mm/dd/yyyy)

☒ Hide Expired

(Search filter : Disabled)

Total Grants Displayed: 1

Grant Number: 90FX0005-02-00	<a href="#">View NGA</a>
Amendment Number: 0	<a href="#">Award Summary</a>
Budget Period: 2	<a href="#">Terms &amp; Conditions</a>
Grant Program: Health Profession Opportunity Grants - TANF (FX)	<a href="#">Grant Assignments</a>
Program Office: ACF/OFA - Health Profession Opportunity Grants	<a href="#">Grant Notes</a>
Project Title: Pathways to Health Care Professions	<a href="#">History</a>
Grantee Name: Pima County Community College District	<a href="#">Send Message</a>
Award Issue Date: 09/29/2011	<a href="#">Manage Amendments</a>
	<a href="#">Manage Project Abstract</a>
	<a href="#">Risk Assessment</a>
	<a href="#">Contact Management</a>
	<a href="#">Task Management</a>

2) Scroll down and click on "ADD"

GrantSolutions - Windows Internet Explorer

https://www.grantsolutions.gov/gs/listNote.gs?layoutWithoutMenu=Y&projectId=71312&applicationId=111763

Grant Award Action: Ready for Approval		Automatic	Timothy Chappelle	09/25/2011 17:46 (GMT -04:00) EDT	2	FX11000039	
Grant Award Action: Ready for Review		Automatic	Michelle Sousa	09/23/2011 18:58 (GMT -04:00) EDT	2	FX11000039	
Draft NGA		Automatic	Michelle Sousa	09/23/2011 18:37 (GMT -04:00) EDT	2	FX11000039	
Funding Memo approved for FX11000039		Automatic	Mr. Stan Koutstaal	08/12/2011 08:39 (GMT -04:00) EDT	2	FX11000039	
Funding Memo approved for FX11000045		Automatic	Ms. Kimberly Stupica	08/11/2011 10:44 (GMT -04:00) EDT	1	FX11000045	
Application Returned from Review In Progress to Submitted Status		Internal	Kimberly Stupica-gms	07/08/2011 16:45 (GMT -04:00) EDT	2	FX11000039	
Application Submitted - Fed Received Date - null		Automatic	Kimberly Stupica-gms	07/05/2011 13:42 (GMT -04:00) EDT	1	FX11000045	

Has Attachment Edit Note Delete Note View Note

3) Enter the required information in the "GRANT NOTES" fields

Internet Explorer

note.gs?action=add&layoutWithoutMenu=Y&applicationId=111763&projectId=71312&f\_nt=&f\_ar=&f\_ha=&f\_fd=&f\_td=&f\_sj=

es ▾

Safety ▾ Tools ▾ ? ▾

### Grant Notes - Add

Author: Ms. Kimberly Stupica

\*Subject: Marketing Recruitment Flyer

\*Note Type: Correspondence ▾

\*Category Type: Grantee Marketing Materials ▾

\*Notes: (Limit to 2000 characters)

Recruitment flyer for Medical Assisting

Add Cancel

---

### Note Attachments

Description:

File to Upload: Browse...

Upload

Description	Source Attachments	Status	Actions
-------------	--------------------	--------	---------

\* Status updates every 10 seconds

Please see the Appendix for the correct naming conventions for each document type and field.

To attach a document to the note:

4) Before you upload an Attachment, rename it. When naming Attachments, use the exact same format as the Subject, but insert the grant number at the beginning of the file name. For example: 90FX0005 Marketing Recruitment Flyer10 2011 Approved

5) Click on "Browse" in the Note Attachments section

The screenshot shows the 'Grant Notes - Add' form. The 'Author' is 'Ms. Kimberly Stupica'. The 'Subject' is 'Marketing Recruitment Flyer'. The 'Note Type' is 'Correspondence' and the 'Category Type' is 'Grantee Marketing Materials'. The 'Notes' field contains 'Recruitment flyer for Medical Assisting'. Below the form, the 'Note Attachments' section has a 'Description' field, a 'File to Upload' field, and a 'Browse...' button. An arrow points to the 'Browse...' button. At the bottom, there is a table with columns: Description, Source Attachments, Status, and Actions. A status message at the bottom says '\* Status updates every 10 seconds'.

6) Select the document to be added

The screenshot shows the 'Choose File to Upload' dialog box. The 'Look in' dropdown is set to 'Pima CC'. The file list includes 'Budget Mod', '90FX0005 Marketing Recruitment Flyer 10 2011 Approved.docx', 'Copy of SF-425\_revised\_06-03-2011.pdf', 'Letter\_Contact Person.pdf', 'Letter\_PCCGrantsOversightMemo.pdf', 'MOU HPOG-TANF 2010 - GCWP.doc', 'MOU HPOG-TANF 2010 - LWIB.doc', 'Personnel\_Hiring Process.docx', 'Personnel\_Job Description\_Advanced Program Manager.pdf', 'Personnel\_Job Description\_Program Coordinator.mht', 'Personnel\_Resume\_Program Coordinator\_Rillos.docx', and 'StrengthenHealthcare\_WMV 360p (4x3).wmv'. An arrow points to the file '90FX0005 Marketing Recruitment Flyer 10 2011 Approved.docx'. The 'File name' field is empty, and the 'Files of type' dropdown is set to 'All Files (\*.\*)'. At the bottom, there is a status message: '\* Status updates every 10 seconds'.

6) Enter a brief description of the document being uploaded.

**Grant Notes - Add**

Author: Ms. Kimberly Stupica

\*Subject: Marketing Recruitment Flyer

\*Note Type: Correspondence

\*Category Type: Grantee Marketing Materials

\*Notes: (Limit to 2000 characters)  
Recruitment flyer for Medical Assisting

Add

Cancel

Note Attachments

Description: Medical Assisting Recruitment Flyer

File to Upload: C:\Documents and Settings\ [Browse...]

Upload

Description	Source Attachments	Status	Actions
* Status updates every 10 seconds			

7) Click on "UPLOAD" to attach the file in "GRANT NOTES"

**Grant Notes - Add**

Author: Ms. Kimberly Stupica

\*Subject: Marketing Recruitment Flyer

\*Note Type: Correspondence

\*Category Type: Grantee Marketing Materials

\*Notes: (Limit to 2000 characters)  
Recruitment flyer for Medical Assisting

Add

Cancel

Note Attachments

Description: Medical Assisting Recruitment Flyer

File to Upload: C:\Documents and Settings\ [Browse...]

Upload

Description	Source Attachments	Status	Actions
* Status updates every 10 seconds			

8) Once you have uploaded the file, click “ADD” to attach the note. *Please note:* Even though you have uploaded the document you must click “ADD” for the note to be stored in the system. If you do not click “ADD,” the document will not be stored and will not appear in the system the next time you log in.

### Grant Notes - Add

Author: Kimberly Stupica-gms

\*Subject:

\*Note Type:

\*Category Type:

\*Notes:  (Limit to 2000 characters)

---

### Note Attachments

Description:

File to Upload:

Description	Source Attachments	Status	Actions
Medical Assisting Recruitment Flyer	90FX0005 Marketing Recruitment Flyer 10 2011 Approved.docx	QUEUED	

\* Status updates every 10 seconds

\*To cancel this action and return to “MY GRANTS LIST”, click "CANCEL" at any time.

Once the note has been attached, you will be able to View, Edit, or Delete the note.  
**Only the user who created the note will be able to make modifications to it.**

# Grant Note Fields

---

**Author:** Identifies who created the Grant Note. This pre-populates with the current users information.

**Subject:** Identifies what the Grant Note is (424A, Contract, Performance Progress Report, etc). This is the primary field to name the Grant Note, and search for Grant Notes when you want to find them after uploading them. Remember to use the prescribed naming conventions found in the Appendix.

**Note Type:** There will only be one option: Correspondence. If this is not pre-populated, please make sure the Correspondence option is chosen.

**Category Type:** The options are:

- Budget Information Request
- Category Not Defined
- Grantee Marketing Materials
- Other
- Policy Request
- Programmatic Information Request
- Programmatic Report
- Site Visit Report
- Technical Review

**Notes:** Anything can be typed in this field, but remember to make the note briefly explain the purpose of the Grant Note. You cannot search or sort by the contents of the Note.

**Description:** Anything can be typed in this field, but remember to make the description briefly explain what document is being uploaded. You cannot search or sort by the contents of the Description. If there are multiple documents of the same type (such as site visit reports or marketing materials) a brief description here could be very useful.

**File to Upload:** Clicking Browse here will allow you to upload a file. Keep in mind that ACF may be downloading many files from different grantees for easier reading and use. Before you upload an Attachment, rename it. When naming Attachments, use the exact same format as the Subject, but insert the grant number at the beginning of the file name. For example: 90FX0005 Marketing Recruitment Flyer10 2011 Approved

**Be careful not to use acronyms, abbreviations, alternate names, alternate spellings, or misspellings.**

## Searching for a Grant Note

---

When searching for a Grant Note, you can search by date, author, and subject. It is important to follow the naming conventions described in the Appendix because when your organization or the program office searches for a Grant Note, we will use the same wording. This will make searching hundreds of Grant Notes much faster.

### Appendix – Naming Conventions

Grant Note	Subject	Note Type	Category Type
What you are trying to upload?	<b>NAME</b> = brief description or name of 3 <sup>rd</sup> Party from contract, MOU, or resume <b>MM YYYY</b> = Month and Year <b>STATUS</b> = Approved, Proposed, or Signed <b>APP #</b> = Application Number assigned to amendment in GrantSolutions	Internal = Private Correspondence = Public	
120 Day Workplan	120 Day Workplan STATUS	Correspondence	Programmatic Report
424A	424A MM YYYY STATUS	Correspondence	Budget Information Request
Budget Revision	Budget Revision MM YYYY STATUS	Correspondence	Budget Information Request
Contract	Contract NAME MM YYYY STATUS	Correspondence	Programmatic Information Request
Cooperative Agreement	Cooperative Agreement MM YYYY	Correspondence	Programmatic Information Request
Corrective Action Plan	Corrective Action Plan MM YYYY	Correspondence	Policy Request
Correspondence	Correspondence NAME MM YYYY	Correspondence	Other
Curriculum	Curriculum NAME MM YYYY	Correspondence	Programmatic Information Request
Final Federal Financial Report/ 425	Final Financial Report MM YYYY	Correspondence	Budget Information Request
Federal Financial Report/ 425	Financial Report MM YYYY	Correspondence	Budget Information Request
Grant Application	Grant Application	Correspondence	Programmatic Information Request
Marketing Materials	Marketing NAME MM YYYY STATUS	Correspondence	Grantee Marketing Materials
Memorandum of Understanding	MOU NAME MM YYYY STATUS	Correspondence	Programmatic Information Request
Performance Progress Report (PPR)	Performance Progress Report MM YYYY STATUS	Correspondence	Programmatic Report
Policies	Policies NAME MM YYYY	Correspondence	Policy Request
Resume	Resume NAME MM YYYY STATUS	Correspondence	Programmatic Information Request
Revised Documents Requested for Budget Revision Amendment	Revised Docs-Budget Revision APP# MM YYYY	Correspondence	Budget Information Request
Revised Documents Requested for Non-Competing Continuation Application	Revised Docs-Continuation App APP# MM YYYY	Correspondence	Programmatic Information Request
Site Visit Report	Site Visit Report NAME MM YYYY	Correspondence	Site Visit Report
Technical Assistance Documents	Technical Assistance NAME MM YYYY	Correspondence	Programmatic Information Request
Work Plan Revision	Work Plan Revision MM YYYY STATUS	Correspondence	Programmatic Information Request
Other Documents	NAME MM YYYY	Correspondence	Other

**Be careful not to use acronyms, abbreviations, alternate names, alternate spellings, or misspellings.  
 Use acronyms and abbreviations only in the NAME of the subject when absolutely necessary due to character limitations.**

Grant Note	Explanation
<b>What you are trying to upload?</b>	
120 Day Workplan	120 Day Workplan that the organization submitted January 2011
424A	Standard Form 424A
Budget Revision	Any update to the grantee budget that does not meet the “significant re-budgeting” threshold (cumulative transfers among budget cost categories totaling 25% of project costs or \$250,000, whichever is lower) requiring a full budget modification through a GrantSolutions Amendment. A budget revision below 25% of project costs or \$250,000 should include an updated budget narrative or line item budget reflecting the changes.
Contract	Any contract or service agreement between a grantee and a third party to acquire commercial goods or services using federal funds. Upload the executed contract, procurement policies, and any requested additional documentation (such as sole source agreements or justifications) in the grant note.
Cooperative Agreement	A financial assistance support mechanism used when there will be substantial Federal programmatic involvement. The Cooperative Agreement document is signed by the Authorizing Official.
Corrective Action Plan	A plan created by the grantee in response to a Non-Compliance Letter issued by the Administration for Children and Families (ACF).
Correspondence	Any documents, such as e-mails or letters, that document grantee and/or ACF action or approval related to programmatic/ administrative aspects of the grant.
Curriculum	Any curriculum documents relating to occupational or soft skills training (ie. syllabi, course catalogues, curriculum overviews, etc.)
Final Federal Status Report/ 425	Standard Form 425 used to report the status of liquidated funds for the budget year. Due annually.
Federal Financial Report/ 425	Standard Form 425 used to report the status of funds and to monitor the financial progress of awards on a semi-annual basis. Due every six months.
Grant Application	The original grant application sent in response to the Funding Opportunity Announcement
Marketing Materials	Any document that the grantee creates to send to the public or that has a public audience. This includes documents such as recruitment materials, brochures, advertisements, press releases, banners, etc.
Memorandum of Understanding	Any Memorandum of Understanding between a grantee and a third party outlining roles and responsibilities of the parties.
Performance Progress Report (PPR)	Semi-annual report submitted by the recipient. Due every six months.
Policies	Any organizational policy that the grantee functions under or creates to run the program. This includes documents such as procurement policies, personnel policies, supportive service policies, incentive policies, training account policies, etc.
Resume	Any resume for key personnel of the grantee or contractor carrying out programmatic work. Upload the resume, job description, and a description of the hiring process in the grant note.
Revised Documents Requested for Budget Revision Amendment	Any revised documents (424, 424A, Budget Narrative, Indirect Cost Rate Agreement, etc.) that have been requested by ACF as a result of a Budget Modification/Revision that was submitted to ACF for approval.
Revised Documents Requested for Non-Competing Continuation Application	Any revised documents (424, 424A, Budget Narrative, Indirect Cost Rate Agreement, etc.) that have been requested by ACF as a result of a Continuation Application that was submitted.
Site Visit Report	A report completed by ACF after conducting a site visit to a grantee location.
Technical Assistance Documents	Documents created during the provision of technical assistance such as reports (Blueprints), program maps, career ladders, etc.
Work Plan Revision	This would be any document that reflects a change to the current work plan that would not meet the “change in scope” threshold required for an amendment.
Other Documents	If the document to be uploaded does not fit in any of the above categories (after checking carefully), please contact your program specialist before uploading the grant note in order to receive the new naming convention for the document.



